Mail Merge (Excerpted from PCC+ User Manual, section 2.6)

Mail merge is a method of connecting a Word document to a database. In this case, an Encounter Form will be connected to patient data, user preferences, and site preferences stored in the PCC database. The secret of this technique is to imbed fields (connections to the PCC database) in the Word document.

Attaching Header and Data Files
First, attach header and data files to your form to create a mail merge document.

1. Click *Tools* from the menu. (See Figure 25.)

   - Click *Mail Merge*. The *Mail Merge Helper* window opens.

2. Click the *Create* button. A dropdown menu opens.

3. Click *Form Letters*. A window opens.

4. Click *Active Window*. The *Mail Merge Helper* window returns to the front.

5. Click the *Get Data* button. A dropdown menu opens.

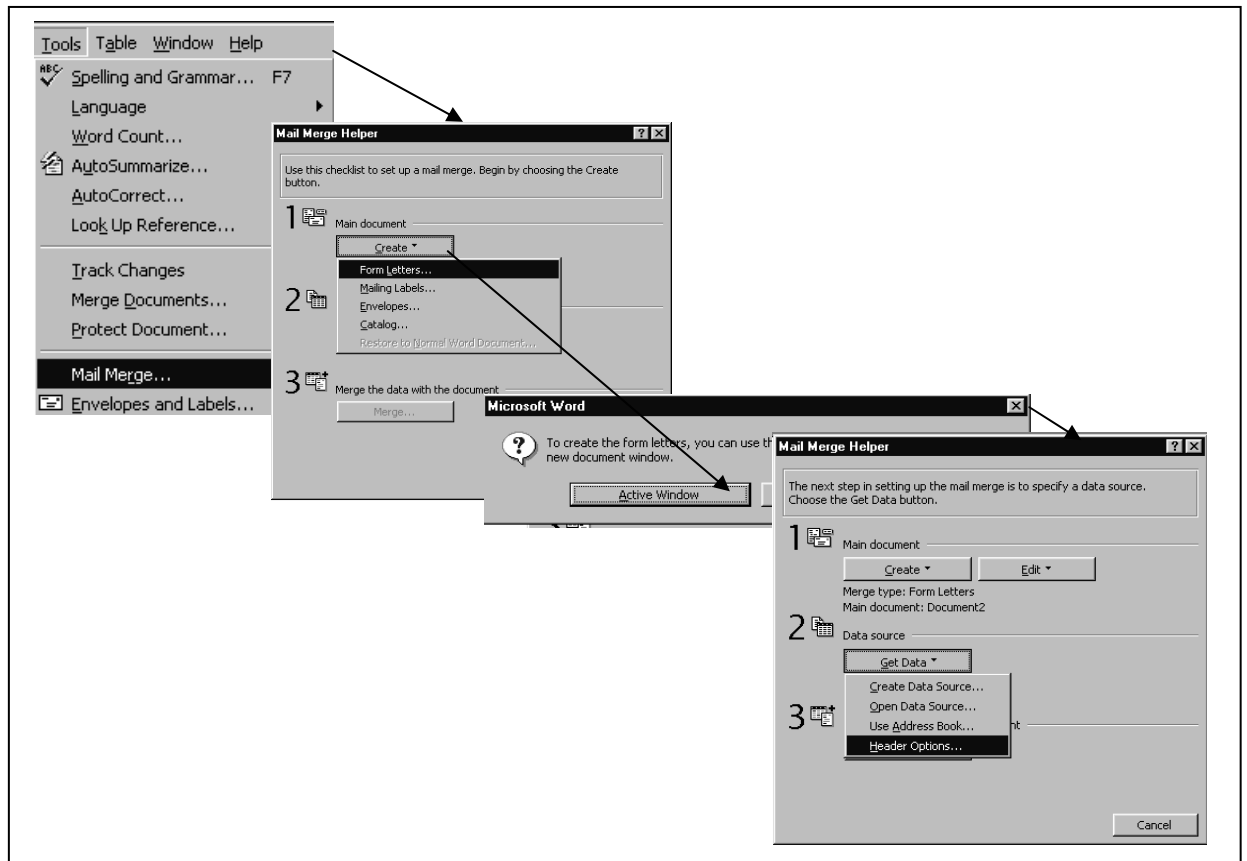6. Click *Header Options*. (See Figure 25.) The *Header Option* window opens.

Figure 1: Attaching header and data files, steps 1 – 6.

7. Click *Open* to specify a header. The *Open* window appears.

8. Select *All Files* from the <u>Files of type:</u> field.

   - Select the header source: *(navigate to the location of the ef_header.txt)*

   - Click *Open*. The *Mail Merge Helper* window returns to the front.

9. Click *Get Data* again. A dropdown menu appears.

   - Click *Open Data Source*. The *Open Data Source* window opens.

10. Select *Word documents* from the <u>Files of type:</u> field.

    - Navigate to: *efdata.doc*. The *Header Record Delimiters* window opens.

11. Select the **caret (^)** in the <u>Field delimiter</u> field and press *OK*. The *Mail Merge Helper* window returns to the front.

12. Press the *Close button*. The Encounter Form is now able to use mail merge. The mail merge toolbar should now be visible (Figure 3).
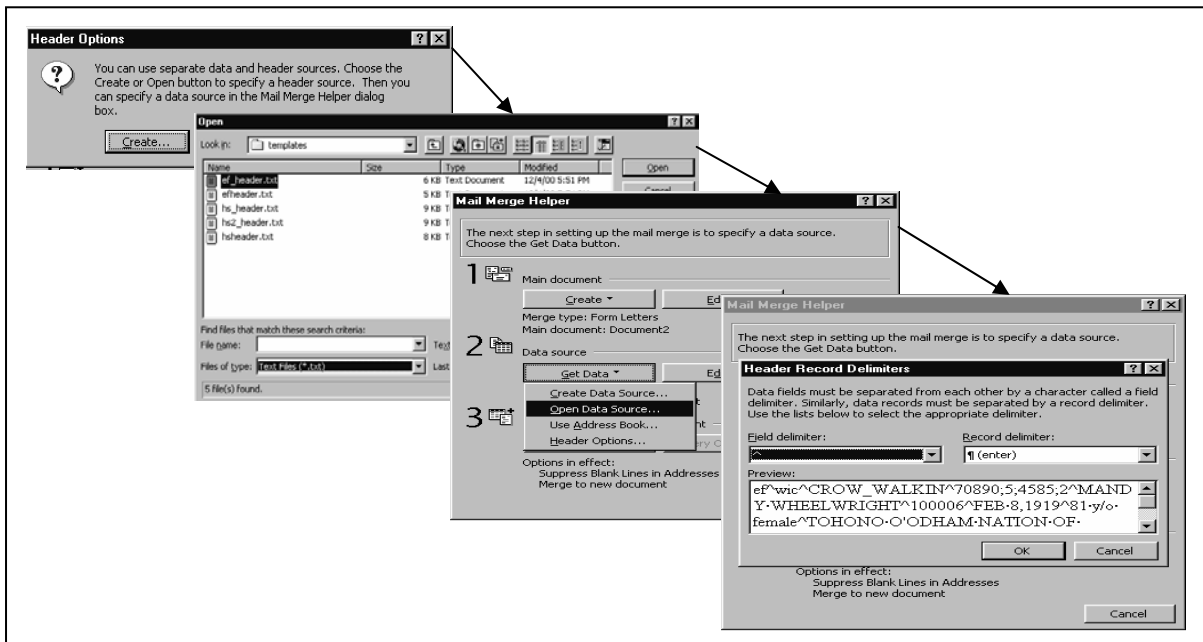

Figure 2: Attaching Header and data files, steps 6 – 11.

F

Figure 3: Mail merge toolbar, step 10.